



**Proposal to Facilitate the Strategic Planning Process for Mendocino County  
Submitted by Bischoff Consulting (lead contractor) and The HR Matrix, LLC  
May 28, 2021**

## **Introduction**

Thank you for the opportunity for Bischoff Consulting and The HR Matrix, LLC to present the following information in response to your request to submit a written proposal for working with the leadership of the County of Mendocino to facilitate the development of a strategic plan. Bischoff Consulting principal consultant B.J. Bischoff and Gary Hochman, principal consultant with The HR Matrix, LLC, have worked together on leadership development initiatives for St. Joseph Health (now Providence) and REACH Air Medical Services over the past eight years. Through her current contract to provide training for County of Mendocino managers and supervisors, B.J. is learning about the specific issues facing the county's leadership. B.J. and Gary each have over 30 years' experience in the design and implementation of projects that involve facilitating group discussions and developing planning documents to implement new programs, form public policy, evaluate existing initiatives, and chart the future direction of government organizations. B.J.'s experience in facilitating the development of Napa County's strategic plan in 2018-19 and Sonoma County's COVID/Fire Disaster Economic Recovery Plan in 2020 and Gary's experience in facilitating Sonoma County's strategic plan in 2020-21 provided us with current, relevant insight into the opportunities and challenges facing our region. It is an honor for us to be asked to continue our work together by collaborating on this proposal to help guide you through the strategic planning process.

## **Grounding principles, approach to strategic planning, and project assumptions**

The creation of a strategic plan is an extremely important process for a government body. A clear plan, developed with participation of key stakeholders, and executed with fidelity and flexibility, provides the foundation for solid growth and constituent responsiveness. We have had the opportunity to assist over 250 domestic and international government and nonprofit organizations with their planning efforts over the past 30 years. Our clients have spanned a great variety of sectors, including agriculture, education, the arts, social services, justice, the environment, housing, workforce development, health, economic development, and homeland security. Both our practical experience and formal university-level education in journalism, organizational development, and group facilitation have provided us with a solid background to lead strategic planning projects.

Our clients would agree that our project approach and consulting style can be characterized in the following way:

- Direct, diplomatic approach to communication
- Timely response to client communications
- Organized approach to project management
- Stay on-track in implementing meetings, all of which have specific agendas
- Excellent writing skills
- Skilled, professional group facilitation skills
- Treat people with great dignity, while creating an environment of equity and inclusion
- Sensitive to the cultural norms of a client organization
- Strong ability to translate high-level stakeholder perceptions and ideas into straight-forward concepts and documentation
- Adhere to Brown Act requirements

We believe in the importance of involving key stakeholders in a way that ensures all voices are heard and that people feel included and respected. The reason to involve stakeholders in a planning process is because creative solutions to the challenges a community faces emerge from synergistic ideas of the stakeholders, not from discussions occurring in silos. We believe it's necessary to conclude a strategic planning project by providing implementation planning tools that include specific, measurable goals; objectives; tactics; timelines; and the names of individuals responsible for implementation. We also believe it's essential to provide a dashboard document to be used to regularly communicate plan implementation progress to the organization's governing body. Our experience is that if there is no implementation workplan, the strategic plan will not actually guide the work of the organization.

The success of this strategic planning initiative is dependent on the following conditions of engagement:

- Board of Supervisors is highly invested in completing the project and providing the necessary direction, decision-making, and resources to accomplish the tasks.
- Board of Supervisors appoints a capable Project Manager who is a partner to the consulting team and has the time, skills, influence, and resources to guide the project, edit planning documents, engage department heads and manage the various project steps.
- CEO's role is understood and agreed to by all relevant stakeholders.
- Mendocino County provides adequate administrative support (e.g. scheduling), technology, space, and other resources as needed to complete the project.
- The consulting team determines which consultant to assign to each task to maximize efficiency and prevent duplication of effort, while still providing the requisite expertise to accomplish each task.

### **Suggested process for developing Mendocino County's Five-Year Strategic Plan**

The following are recommended steps to be conducted for developing the Mendocino County five-year strategic plan. They do not have to be implemented in the exact order presented and can be modified to better align with Brown Act requirements, as needed.

#### **A. PLANNING AND LAUNCH (July 2021)**

**Estimated @ 36 hours**

***Output: Clear goals, roles, and expectations***

1. Appoint a Project Manager who will serve as a partner to the consulting team and has the time, skills, influence, and resources to guide the project, edit planning documents, engage department heads, and manage the various project steps. This individual should be a staff member who is readily available during business hours and has good rapport with County staff. Ideally, this person will continue working with County divisions/agencies/departments to implement division-, agency-, and department-level action plans to implement the strategic plan after the plan is approved by the Board of Supervisors (BOS).
2. Discuss and agree on desired outcomes, process, involvement, timeline, and milestones.
3. Create the plan nomenclature and model for final design.
4. Appoint a Strategic Plan Task Force (suggested to be 5 members) comprised of County division/agency/department heads to help lead the process of completing the strategic plan. This Task Force will meet regularly to review stakeholder feedback and plan-related draft documents. Task Force members will serve as champions for the planning process and should be respected among County employees and members of the community.
5. Create a project plan with specific dates and milestones.
6. Work with Project Manager to have County staff communicate to key stakeholders, department heads, Board of Supervisors, and others about the strategic planning initiative; Advise County staff on establishing ways for stakeholders to be kept informed about the planning process and how they can contribute their comments.
7. Obtain and review existing planning-related documents developed by Mendocino County government divisions/agencies/departments.

## **B. BUILD INITIAL FRAMEWORK (August-September 2021)**

**Estimated @ 48 hours**

***Output: Strategic plan framework with pillars and preliminary goals***

1. Conduct regular planning meeting(s) with the Project Manager and Task Force.
2. Conduct small group meetings with individual Supervisors to gain insight into direction, vision, and priorities, and how they envision using the plan to guide decision-making.
3. Work with the Task Force to create a plan framework, based on Supervisors' vision and Task Force members' knowledge of departmental priorities and responsibilities.
4. Facilitate study sessions with the BOS, as needed, to discuss advantages and drawbacks of various county governance models and other topics that may require in-depth exploration with the BOS
5. Document the plan framework, which could include pillars, focus areas, guiding principles, values, vision, mission, etc.
6. Provide feedback to the BOS to confirm framework.
7. Integrate additional BOS feedback and ideas into the framework.

## **C. DEPARTMENT HEAD INPUT (October 2021)**

**Estimated @ 36 hours**

***Output: Framework with pillars, preliminary goals, and initial objectives***

1. Work with the Project Manager and Task Force to plan and facilitate a planning meeting for department heads.
2. Facilitate a department head meeting to gain additional insights, inputs, and ideas for the goals and objectives of the plan.
3. Enhance the plan framework; Refine preliminary goals and initial objectives.
4. Communicate the plan framework and preliminary goals and initial objectives with the BOS.
5. Integrate additional BOS feedback and ideas into the draft framework, goals and objectives.

## **D. EMPLOYEE AND COMMUNITY ENGAGEMENT (October-November 2021)**

**Estimated @ 96 hours**

***Output: Revised plan with employee and community input***

1. Work with the Project Manager and Task Force to develop an outreach plan to include methods for obtaining input from County employees, City/Town Managers and Mayors/Vice Mayors from County municipalities, and people who live and work in Mendocino County. Methods could include surveys, key stakeholder interviews, focus groups, etc.
2. Design selected outreach methods.
3. Work with the Project Manager to have County staff create communication materials, schedule sessions, and invite participants.
4. Facilitate data gathering methods to solicit reactions, questions, and inputs to the draft framework, goals, and objectives.
5. Work with the Task Force to integrate community input into the draft framework, goals, and objectives.
6. Revise plan, based on Task Force input.
7. Send revised plan to individual Supervisors to obtain input into the revised plan.

## **E. FINALIZE PLAN (November-December 2021)**

**Estimated @ 48 hours**

***Output: Final plan document prepared for Board approval***

1. Work with the Project Manager and Task Force to finalize the Strategic Plan.
2. Review the Strategic Plan final draft with BOS members; refine as needed.

3. Work with Project Manager to develop the Board Item for Strategic Plan approval.
4. Secure Board approval through a vote.

## F. PROVIDE GUIDANCE TO OPERATIONALIZE PLAN (January 2022)

**Estimated @ 36 hours**

**Output: Annual workplan template, implementation reporting dashboard, and department workplan development strategy**

1. Work with the Project Manager and Task Force to design a strategy with key dates for County staff to develop annual department workplans that align with the Strategic Plan.
2. Develop the template that department leaders can use to work with their teams to develop annual workplans aligned with the Strategic Plan.
3. Develop the reporting dashboard that County staff can use to report progress on plan implementation to the BOS and the community.

## Data Collection and Consulting Methodology

Bischoff Consulting will serve as the contracting entity for this consulting project. Meetings and consultations will be conducted via Zoom to the extent possible. Online surveys will be developed using the user-friendly Survey Monkey platform. We will create a dedicated DropBox folder to share documents with the Project Manager and Strategic Plan Task Force.

## Project Cost Estimate

This planning engagement is expected to cost \$75,000 plus actual costs associated with travel (mileage, lodging, and meals) between Sonoma and Mendocino County and within Mendocino County. This cost estimate is based on a level of effort of 300 hours at a rate of \$250 per hour.

## Capabilities and Past Performance of Consulting Team

### Countywide planning projects led by Bischoff Consulting

1. **Napa County Strategic Plan:** <https://www.countyofnapa.org/DocumentCenter/View/10804/2019-2022-Strategic-Plan-PDF?bidId=>
2. **Sonoma County Economic Recovery Action Plan (from COVID-19 and natural disasters):** <http://sonomaedb.org/Business-Assistance/Economic-Recovery-Action-Plan-ENG-ADA/>
3. **Sonoma County Cannabis Economic Impact Task Force Report:** <https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKEwiCjNjazrrvAhWfHzQIHq3DakQFjACegQIBhAD&url=http%3A%2F%2Fsonomaedb.org%2FWorkArea%2FDownloadAsset.aspx%3Fid%3D2147525196&usq=AOvVaw1zSVOxoioozG7QczTxC1YQ>
4. **Sonoma County Area Agency on Aging: Area Plan and Community Report:** [https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKEwiSkdfN0LrvAhWTGjQIHfiqDCEQFjAAegQIAhAD&url=https%3A%2F%2Fsonomacounty.ca.gov%2FWorkArea%2FDownloadAsset.aspx%3Fid%3D2147564155&usq=AOvVaw0M9RzVRV\\_e6LDRzhXGg0Zs](https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKEwiSkdfN0LrvAhWTGjQIHfiqDCEQFjAAegQIAhAD&url=https%3A%2F%2Fsonomacounty.ca.gov%2FWorkArea%2FDownloadAsset.aspx%3Fid%3D2147564155&usq=AOvVaw0M9RzVRV_e6LDRzhXGg0Zs)
5. **Petaluma Health Care District Strategic Plan:** [https://phcd.org/manual\\_images/FINAL%20-%20PHCD%202019-24%20Strategic%20Plan.pdf](https://phcd.org/manual_images/FINAL%20-%20PHCD%202019-24%20Strategic%20Plan.pdf)

### Planning initiatives led by The HR Matrix, LLC

1. **Sonoma County Strategic Plan: 2021-2026:**  
Primary consultant to Sonoma County Strategic Plan, 2021 – 2026. <https://sonomacounty.ca.gov/Board-of-Supervisors/Strategic-Plan/>

Developed plan architecture and initial project plan, facilitated launch meetings with Department Heads, public meetings with Board of Supervisors and County leaders, and guided steering team and Project Manager through the development of values, pillars, goals, and draft objectives. Designed and led numerous open houses and focus groups for employees and community members (English and Spanish) to provide input and feedback into the Plan. Reviewed and edited integrated feedback with Project Manager in service of final draft of Plan.

## 2. Providence St. Joseph Health System - SoCal, strategic plan 2021-2023

Sole consultant to Providence St. Joseph Health System - SoCal, strategic plan 2021-2023. Sole consultant for creation of single 3-year strategic plan for multiple medical groups in Orange County and High Desert. Developed plan architecture and initial project plan and drafted strategic pillars with Chief Executive. In collaboration with internal Project Manager, engaged physician leaders via a survey for initial feedback. Designed and facilitated multiple MS Team meetings, Board meetings, and forums to provide input, edits, and final approval.

### Strategic Pillars & Goals

Unify the Physician Voice	Build the Medical Practice of the Future	Develop Specialty Service Lines	Improve Financial Performance
<p>Unify and align Heritage medical groups to enhance their strength, influence, and well-being</p> <ul style="list-style-type: none"> <li>Win in new markets through collaboration on growth strategy</li> <li>Strengthen the overall position of Heritage medical groups within PSJH to ensure appropriate resources and input into key decision-making processes</li> <li>Cultivate a unified physician community and culture (leveraging key elements of individual medical group identity) that serves as a source of strength, pride, and well-being</li> </ul>	<p>Meet the evolving needs of patients, communities, and providers with innovative delivery models and new operational standards</p> <ul style="list-style-type: none"> <li>Attract and recruit high-quality physician talent who can meet the unique needs of our diverse communities</li> <li>Offer a wide range of access availability to both existing and future patients</li> <li>Deploy team-based care in primary care clinics throughout our service area</li> <li>Optimize the use of technology, scheduling, and physical space to enable efficient growth as well as safe, high-value patient care</li> </ul>	<p>Become a leading presence for specialty care, ensuring seamless, integrated offerings across our markets</p> <ul style="list-style-type: none"> <li>Identify, design, and deploy specialty programs across service area (e.g. oncology, dermatology, GI)</li> <li>Create agreements, processes, and structures to serve patients seamlessly across the service area</li> <li>Enhance partnership with Clinical Institutes to optimally serve patients</li> <li>Partner effectively with affiliates to optimally meet needs for specialty care</li> </ul>	<p>Demonstrate the role of physician practices as the driver of financial performance within the delivery system</p> <ul style="list-style-type: none"> <li>Grow capitation revenue as a proportion of our total book of business</li> <li>Partner with physicians to set financial goals/realities and align incentives to maximize performance (e.g., primary care breakeven, integrated service line performance)</li> </ul>

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Version: 10/26/2020 3:00 PM PST



## 3. Northern California Center for Well-Being Strategic Plan, 2021 - 2023

As Board President, designed and facilitated entire strategic planning process from concept through final approval. Led Steering Team through environmental assessment, development of initial pillars, revision of organizational Mission (focus on health equity), and development of goals and objectives. Facilitated survey and meetings to solicit feedback from Board, employees, and stakeholders. Revised, as required. Developed specific, measurable supporting objectives for each goal with clear accountability and due dates.

### Overview of Bischoff Consulting

Dr. B.J. Bischoff is the owner of Bischoff Performance Improvement Consulting (Bischoff Consulting), a California Certified Small Business, based in Sonoma. For over 30 years, she has specialized in conducting organizational planning, providing program evaluations, offering technical assistance, and implementing performance improvement strategies, primarily for community-based organizations and public sector agencies. Between 1990 and 2010, B.J.'s practice was based in Indianapolis, IN, and is still certified as an Indiana Women Business Enterprise (WBE). She managed large-scale planning and public policy improvement projects for over 25 State of Indiana government departments in state agencies including the Indiana Departments of Commerce,



Administration, Workforce Development, Environmental Management, Family and Social Services Administration, Homeland Security, Education, Lottery, State Library, Local Government Finance, and Personnel; 15 Indiana counties, municipalities, and economic development agencies; the States of Kentucky, Iowa, and New Mexico; and federal agencies including the U.S. Department of State, U.S. Department of Labor, the Centers for Disease Control and Prevention, and Central Intelligence Agency.

She has assisted United Healthcare/Golden Rule Insurance Co. to adopt best-in-class practices for its Indianapolis Learning and Development Center. For four years, she worked with the Executive Leadership of Butler University's College of Business Administration and the College of Pharmacy and Health Sciences on organizational development improvement initiatives. She assisted the Indiana Department of Homeland Security to establish ten regional planning councils throughout Indiana. She managed a Workplace Literacy Pilot initiative on behalf of the Indiana Health Industry Forum, funded by the Indiana Department of Workforce Development. She managed a three-year project evaluating Indiana's post-secondary and secondary career and technical education programs. She completed an evaluation of Indiana's public education system with the National Association of State Boards of Education and the National Governors Association. She created and managed FaithWorks Indiana, one of the nation's top-ranked faith-based initiatives to help low-income families become self-sufficient. She managed Indianapolis Mayor Bart Peterson's public outreach process for addressing the city's combined sewer overflow problems and Indianapolis' public health community assessment process. She managed a statewide assessment for the Indiana Arts Commission and a study examining the State of Philanthropic Giving in Northwest Indiana. She led projects with the Indiana Department of Transportation to improve local government services and with the Indiana Department of Workforce Development to improve implementation of the Workforce Investment Act. She assisted the States of Indiana and New Mexico with their implementation of the Federal School to Work Opportunities Act.

She managed the Centers for Disease Control's first qualitative study on workplace hearing protection. She led community-based programs to identify welfare-to-work best practices for 10 Indiana counties. She managed a statewide citizen input project to identify best practices for the Iowa Department of Human Services to implement to decrease public assistance dependency. She managed a comprehensive evaluation of Kentucky's Community Development Block Grant Program and an evaluation of the quality of care provided by mental health providers in the State of Indiana. She led community focus groups to assist five Indiana United Ways to identify the most critical human services needs in the counties they serve. She conducted the qualitative evaluation component of a statewide disparity study for Indiana's Minority/Women's Business Enterprise Program. She consulted with the Indiana Department of Education's Office of Special Education regarding federal reporting. From 1999 to 2014, B.J. was under contract to provide cross-cultural consulting services to Eli Lilly and Company in the U.S., China, and Japan. She also provided cross-cultural communications training for Rolls Royce Corporation. She served as a contractor to WestEd to help increase the response rate of the annual Indiana Department of Education's Special Education Survey for Parents. She currently serves as the continuing education coordinator for the Indiana Property Assessors.

B.J. also assists nonprofit organizations to achieve their fund development goals through strategic planning and grant proposal development. She wrote grant proposals for 8 different Indiana community foundations to improve education attainment in select Indiana counties, resulting in over \$28 million in funding from The Lilly Endowment. She currently is on retainer with over 25 North Bay nonprofit organizations to serve as their fund development consultant and grant proposal writer. She has facilitated planning sessions for over 200 nonprofit and government-funded organizations.

With a special focus on training trainers and performance improvement consultants, she has developed and conducted train-the-trainer programs for clients with which she has had multiple-year relationships including the Association of Fundraising Professionals; The Center on Philanthropy at Indiana University/The Fundraising School; Eli Lilly and Company; United Healthcare; Blue Cross-Blue Shield/Anthem; Credit Union National Association; United States Central Intelligence Agency; United States Agency for International Development; The Government of Romania; United States Department of Labor; Indiana Department of Environmental

Management; Indiana Department of Workforce Development; Crowe Chizek; Ontario Systems, Inc., Ball State University; and The World Bank.

From 1999 to 2005, B.J. established the government consulting practice for the eighth largest accounting and management consulting firm in the U.S. She owned White River Training & Consulting, Inc. from 1990 to 1999, enabling her to provide training services to developing nations and emerging economies, funded by The World Bank and the U.S. Agency for International Development. Her international work has taken her to 30 countries on projects including conducting *Gender Equity in the Classroom* research, training, and consultation for the Moroccan Ministry of Education, implementing the *Erdut Agreement* of the Dayton Peace Accords, and facilitating the development of a primary healthcare model in Romania. In her previous academic career, she served as the Director of Ball State University's Center for Entrepreneurial Resources, the Manager of Extended Services for Ivy Tech Community College, and the Associate Director for Credit Programs in Continuing Studies at Indiana University - Purdue University at Indianapolis. She served as a ten-year Governor's appointee to Indiana's statewide Human Resource Investment Council/Workforce Investment Board and the Indiana Workforce Proficiency Panel, overseeing the establishment of Indiana's Certificates of Technical Achievement Program.

B.J. earned her Doctorate in Higher Education Administration, her Master of Science degree in College Student Personnel Administration, and her Bachelor of Arts in Journalism and Theatre from Indiana University-Bloomington.

### ***Bischoff Consulting California-Specific Experience***

In 2010, B.J. moved her consulting practice to Sonoma and registered her business with the City of Sonoma and became certified as a California Small Business. Her California practice focuses on providing planning, research services, fund development consulting, grant proposal development, program evaluation, stakeholder outreach, training, and other forms of capacity-building and technical assistance for North Bay nonprofits and public agencies. She is registered as a Fundraising Counsel with the California Office of the Attorney General, Registration Number FP0002925.

Her North Bay fund development and capacity building consulting client list includes Sonoma State University School of Education and School of Science and Technology; Santa Rosa City Schools; Sonoma Valley Unified School District; Sonoma Valley Community Health Center; Alliance Medical Center; Healdsburg; COTS, Petaluma; Hearing Research/Weingarten Children's Center; Community Action Partnership of Sonoma County; Sonoma International Film Festival; Boys & Girls Clubs of Sonoma Valley; Children's Museum of Sonoma County, Santa Rosa; Puertas Abiertas, Napa; TLC Child & Family Services, Sebastopol; Collabria Care, Napa; Olé Health, Napa; Transcendence Theatre, Sonoma; Petaluma Museum Association; Cinnabar Theater, Petaluma; Ceres Community Project, Sebastopol; Restorative Resources, Santa Rosa; Sonoma Valley Museum of Art; Sonoma Valley Education Foundation; Teen Services Sonoma; Mentor Me Petaluma; Sonoma Valley Mentoring Alliance; La Luz Center, Sonoma; Social Advocates for Youth Grief Services, Santa Rosa; CASA of Sonoma County; the LIME Foundation, Santa Rosa; Valley Vibes Youth Orchestras, Sonoma; and Forget Me Not Children's Services, Santa Rosa. She also serves Super Stars Literacy in Oakland and Direct Employers Foundation in Indianapolis. She has recently provided planning services for the Sonoma County Department of Human Services Area Agency on Aging; the Sonoma County Library; the Petaluma Health Care District; the Sonoma County Economic Development Board; the Sonoma County Historical Records Commission; COTS in Petaluma; Rincon Valley Education Foundation; the County of Napa; and the California Film Institute/Mill Valley Film Festival.

She is under contract with the Sonoma County Community Development Commission to provide facilitation services, as needed, for the purpose of reducing homelessness in Sonoma County. She conducts leadership and management classes for the Sonoma County Human Resources Department-Workforce Development Division on Strategic Planning; Facilitation Skills; Presentation Skills; Beginning Supervision; Advanced Supervision; and Becoming a Trusted Leader. She is accepted under an RFQ to facilitate community-based meetings for the Sonoma County Departments of Human Services and Health Services and the Economic

Development Board. She conducted the evaluation for United Way of the Wine Country's School Readiness Backpacks and Earn it! Keep it! Save it! programs. She managed Sonoma Valley Unified School District's implementation of the Grade Level Proficiency Project. She trained all Alameda County Probation Department managers and supervisors on facilitation skills. She provided leadership development for REACH Air Medical Services.

Dr. Bischoff has served as a member of the Upstream Investments Portfolio Review Committee since March 13, 2012, appointed by the Sonoma County Board of Supervisors. She now chairs the Portfolio Review Committee. For ten years she was a featured columnist for the Sonoma Sun newspaper, writing a monthly column called Nonprofit Matters (<http://sonomasun.com/category/nonprofit-matters/>). She is the past president of Impact100 Sonoma and facilitated the Sonoma Valley Nonprofit Board Presidents Council.

### ***Bischoff Consulting Government and Nonprofit Planning Experience***

Dr. B.J. Bischoff has over 30 years of experience in the design and implementation of planning-related initiatives. She has served as the project director and/or senior technical advisor on many domestic and international facilitation-related initiatives, each of which involved (1) extensive facilitation with high-level decision-makers and a variety of community constituents and (2) development of detailed minutes, meeting summaries, goals/objectives documents, planning spreadsheets, and final reports for each engagement. The following are actual examples of projects involving planning and facilitation skills that B.J. has personally managed:

- Napa County Strategic Plan—Consultation and facilitation of over 35 public meetings to develop the county's three-year strategic plan.
- Sonoma County Economic Recovery Action Plan (from COVID-19 and natural disasters)—Facilitated steering committee, work groups, and town halls via Zoom during the pandemic.
- Sonoma County Administrator's Office—Planned and facilitated town halls via Zoom to help inform the Board of Supervisors regarding cannabis cultivation and climate change.
- Petaluma Health Care District Strategic Plan—Consultation and facilitation to develop a five-year plan.
- Sonoma County Community Development Commission—Consultation and facilitation of the Russian River Homelessness Task Force, Sonoma Valley Task Force, and North County Task Force.
- Committee on the Shelterless (COTS), Petaluma, CA--Consultation and facilitation to develop the organization's five-year strategic plan
- Sonoma County Department of Human Services--Consultation, facilitation, and report writing for Sonoma County Area Agency on Aging's Four-year Plan submitted to the California Department of Aging.
- Sonoma County Economic Development Board--Facilitation of Cannabis Task Force and board/staff planning meetings and documentation of outcomes and decisions.
- Sonoma County Library--Consultation and facilitation to develop the Sonoma County Library's five-year strategic plan.
- Sonoma County Human Services Department Upstream Investments--Facilitation of the Upstream Investments Portfolio Review Committee meetings. Planned and facilitated meetings in alignment with Brown Act and Maddy Act requirements.
- Sonoma County Department of Health Services--Facilitation of a planning retreat and documentation of session outcomes and decisions for a major universal preschool community key informant discussion.
- Sonoma County Department of Human Services--READY (Road to the Early Achievement and Development of Youth Resources) planning and meeting facilitation services and trainer of Facilitation Skills workshop, conducted through Department of Health Services funding.
- Sonoma County Childcare Planning Council--Facilitation of community input sessions to inform the implementation of the agency's strategic plan.
- United Way of the Wine Country, Santa Rosa, CA--Facilitation of focus groups and data analysis to develop the annual evaluation for two programs: (1) School Readiness Backpack Program and (2) Earn it! Keep it! Save it! free tax preparation services for income-eligible community members.
- Sonoma County Historical Records Commission--Consultation and facilitation to develop the commission's three-year strategic plan.



- Rincon Valley Education Foundation--Consultation and facilitation to develop the organization's five-year strategic plan.
- Alliance Medical Center, Healdsburg, CA--Facilitation of community outreach and fund development for a federally qualified health center serving northern Sonoma County.
- Centers for Disease Control and Prevention—Evaluation of Hearing Conservation Program Effectiveness, the nation's first qualitative research study to gather data through focus groups on the use of hearing protection in the workplace.
- Marion County (Indianapolis) Health and Hospital Corporation—Assessment of the community's most important health concerns, *Voice of the Community*.
- Indiana Department of Homeland Security—Extensive communications with local homeland security-related organizations to create the infrastructure for Indiana's ten Homeland Security Districts.
- Indiana Division of Mental Health and Addiction—Outreach efforts among low-income consumers of Indiana's community mental health centers to explain the Hoosier Assurance Plan.
- California Film Institute/Mill Valley Film Festival, San Rafael, CA--Facilitated meetings with staff, board, and donors resulting in the development of a three-year strategic plan and a one-year detailed work plan.
- La Luz Center, Sonoma, CA--Facilitation of a board planning retreat and follow-up planning consultation with the staff for an organization that primarily serves Sonoma's Latino Community. Conducted stakeholder interviews to obtain organizational public perception.
- WillMar Family Grief & Healing Center (Now Social Advocates for Youth Grief Services), Sonoma, CA--Facilitation of a fund development plan with the board and implementation of strategies to increase donor and community involvement with the organization.
- Vintage House, Sonoma, CA--Facilitation of a board planning retreat and follow-up planning consultation, resulting in a one-year action plan, with the staff for an organization that serves people over 55 years of age.
- Sonoma Valley Museum of Art, Sonoma, CA--Facilitation of planning discussions with board and staff members, resulting in the creation of a three-year fund development plan.
- Indiana Department of Administration--Facilitated interviews with business owners and leaders of chambers of commerce and business associations as part of the state-mandated Women and Minority Business Disparity Study.
- Jennings County (Indiana) Economic Development Corporation—Helped lead a rural Indiana county (Jennings County) in planning its economic future, in light of the closing of a large state hospital (Muscatatuck State Developmental Center) for the developmentally disabled on 700 acres. The planning process involved extensive public input and infrastructure assessment. The end result was a decision to turn the facility into an urban warfare training facility for the National Guard.
- City of Bloomington, IN—Development of a cultural tourism and strategic direction.
- Indiana Family and Social Services Administration Division of Aging Senior Community Service Employment Program Service—Public outreach strategy development to recruit employers to hire older Hoosiers.
- Indianapolis Coalition for Homelessness Intervention and Prevention--Facilitated planning meetings with key stakeholder groups to implement the *Blueprint for Ending Homelessness*.
- Indiana Family and Social Services Administration Division of Rehabilitation Services Direct Support Professionals Initiative—Outreach to service providers to improve direct support employee's involvement in continuing education programs.
- City of Indianapolis, IN—Identification of citizen concerns and priorities for reducing Combined Sewer Overflows (CSO); Facilitation of the Mayor's CSO Advisory Group.
- Indiana State Board of Education—Outreach to Indiana citizens for K-12 education assessment, *Efficiency and Excellence*.
- 8 County Community Foundations in Indiana—Extensive interaction with local community leaders for a Lilly Endowment study to determine methods for improving education attainment.

- Jackson County United Way; Jennings County United Way; DeKalb County United Way; Fulton County United Way; Adams County United Way—Communication with community members to identify the most critical human needs in five Indiana counties.
- Warren Township (Indianapolis) School Corporation—Identification of strategies from the public for balancing the budget.
- United Way of Central Indiana—Identification of key strategic initiatives.
- Indianapolis Private Industry Council—Development of a strategic plan.
- Iowa Department of Human Services--Led a project resulting in facilitating 25 stakeholder groups throughout Iowa for the to identify citizen priorities regarding fatherhood, marriage, and family supports to improves the lives of children.
- Indiana Department of Transportation—Identification of local elected officials' knowledge of how to access public funding for roads and bridges.
- Indiana Arts Commission—Assessment of the effectiveness of Indiana's Regional Arts Partnership Initiative.
- Indiana Department of Workforce Development—Evaluation of Indiana's Tech Prep initiative in the public high schools.
- Indiana Family and Social Services Administration—Identification of welfare-to-work strategies for ten Indiana Counties.
- Indiana Department of Workforce Development—Identification of ways to improve Workforce Investment Act Youth Performance results.
- Indiana Department of Workforce Development/U.S. Department of Labor—Meeting facilitation resulting in the assessment of the training needs for the U.S. Unemployment Insurance Auditor Training Program.
- Columbus, Indiana Office of Workforce and Education Development —Determination of community standards for workforce skills and education attainment.
- Indiana Family and Social Services Administration—Technical assistance for faith-based organizations to access government funding to move families to self-sufficiency.
- Kentucky Community Development Block Grant program—Identification of program improvement practices.
- Romanian Ministry of Health/U.S. Agency for International Development—Identification of strategies to move Romania to a primary care model of delivering public health services.
- National Kidney Foundation—Identification of methods for improving services to individuals with renal failure.
- Southeast Indianapolis Neighborhood Development—Identification of the workforce development needs of neighborhood residents and area businesses for the purpose of increasing employment opportunities in this low-income area.
- Butler University, Indianapolis, IN--Developed a five-year strategic action plan for the College of Pharmacy and Health Sciences, Developed a three-year strategic plan for the Department of Pharmaceutical Sciences.
- Northeast Indiana Private Industry Council—Development of a strategic plan.
- Three Community Development Corporations in Indianapolis—Development of their individual strategic plans.
- Indiana Legal Foundation—Development of a strategic plan.
- American Civil Liberties Union of Indiana--Fund development strategizing with the board of directors.
- Indiana Insurance Institute—Development of a strategic plan.
- Indianapolis Downtown, Inc.—Development of a strategic plan.

#### **Gary Hochman, Principal, The HR Matrix, LLC**

Gary Hochman has worked in the development of organizations for over 30 years and has served in senior executive, line, and staff roles. As founder of The HR Matrix, his consulting practice integrates strategy, work systems design, and team and individual performance to enhance organizational effectiveness. Throughout his career, Gary has led numerous projects helping executives, managers, and governing entities achieve results in

varied and demanding situations. His facilitation and leadership skills coupled with his business acumen and understanding of organization culture and change, have generated success in a broad range of interventions and situations, including start-ups, mature organizations, non-profits, and complex work systems. Working in close partnership with his clients, Gary designs interactive and participative processes to build accountability and commitment throughout the workplace. Gary brings extensive experience in organization development and human resources and holds expertise in team development, organization design, mergers and acquisitions, culture change, meeting design and facilitation, and the creation and implementation of strategic human resource solutions. In addition to his commitments to his family and community, Gary has served as an adjunct faculty member for graduate programs of organization development at USF and Sonoma State University.

### **Employment History**

- Principal, The HR Matrix, a full spectrum human resources and organization development firm 2006 – present (merged The Hochman Group)
- Principal, The Hochman Group, a management consulting firm 2001-2006
- Vice President, Global Human Resources, Optical Coating Laboratories Inc. 1998 -2001
- Director, Human Resources, Flex Products 1995 - 1998 (subsidiary of OCLI)
- Senior Organization Development Consultant, Hewlett-Packard, 1990 – 1995
- Human Resources Consultant, Malt-O-Meal Company, 1985 – 1990

### **Education**

- University of Minnesota, Master's Degree, Curtis L. Carlson School of Management, Industrial Relations – Organization Development and Training
- University of Minnesota, Bachelor's Degree. Major: Sociology, Minor: Social Work.

### **Representative Clients**

#### **GOVERNMENT**

- Sonoma County
- City of Santa Rosa Police
- Solano County
- State Compensation Insurance Fund
- Napa County Health and Human Services
- Sonoma Academy
- LandPaths

#### **HEALTH CARE**

- St. Joseph Health System
- Heritage Health Care Foundation
- Providence Health and Services
- Dignity Health and Services
- Annadel Medical Group
- Peace Health
- Carolina East Medical Center
- Reach Air Holdings
- Santa Rosa Community Health Center

#### **MANUFACTURING**

- Amy's Kitchen
- Genentech / Roche
- Daymen / Lowepro
- West Coast Industries
- Beringer Winery (now Treasury Wine Estates)
- Traditional Medicinals

#### **OTHER**

- Electronic Arts
- Lucas Film
- The Focal Point (Trial consulting)
- Checkers Catering

#### **NONPROFIT**

- Earthjustice
- Playworks
- Earle Baum Center for the Blind
- Redwood Empire Food Bank
- Safe and Sound (SF CAPC)
- Harvard-Westlake School